Updating a Recurring DMS Payment

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Donor Management System

After adding a recurring DMS Live Payment, you can easily update the donor's billing information and a few other details anytime.

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Considerations

- At this time, if you need to update the *amount* or *frequency* for **either** a **credit card or EFT** recurring payment, you'll simply need to **cancel** it and **set up** a **new** live payment reflecting the desired changes.
- Currently, you can only update billing information for a live payment made via credit card.
 - To change a donor's bank account details (for EFT live payments), you'll need to login to your iATS
 Portal directly.
- For security reasons, you can only update one recurring DMS Payment at a time.

Identifying the Recurring DMS Payment

1. Visit the Contributions Tab

2. Search for the recurring DMS Contribution you wish to update and select the Contact's name

1	Wellness Avenue	Dashboard Contacts Contr	ibutions	Campaigns Opportunitie	s Reports	DMS Mail				Set	tings Help DMSCA +
search by contributor name or email Q Advanced Search											
Actions * O Selected Records Only All 1452 Records							All Contribution	S 👻	Advanced Actions	• Add Cont	ribution
	Received	Name	Amount	Fund	Campaign	Source		Method	Status	Receipt No.	Thanked
	March 2nd, 2023 10:30 AM	A. L. Kostenko	\$78.00	Community Outreach Fund		DMS M	lanual	Cash	Completed		-
	March 2nd, 2023 10:16 AM	A. L. Kostenko	\$88.00	General Fund		DMS M	lanual	EFT	Completed		-
	March 2nd, 2023 10:13 AM	Lucas Froese	\$100.00	General Fund		DMS M	1anual	Cash	Completed	WELL00000923	*
	March 2nd, 2023 01:59 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS P Contril	ayments Credit Card oution (Recurring)	Credit Card	Completed		-
	March 1st, 2023 05:34 PM	Nicole Lam	\$200.00	General Fund		DMS N	1anual	Cheque	Completed	WELL00000922	*
	March 1st, 2023 05:26 PM	Munoz Jordan	\$20.00	General Fund	Fundraising for peace			Cheque	Completed		?
				Select a C	Contact's no	ime					

4. You will be directed to the Contact's Profile. From there, select Contributions

Welliness Avenue Dashboard Contacts Contribut	ions Campaigns Opportunities Reports DMS Mail	Settings Help DMSCA DMSCA +
Benjamin A Franklin E Summary Contributions 200 S Activities 430 👁 Rel	ationships 1 👹 Groups 5 🗌 Notes 1 🐞 Tags 0 🛞 Opportunitie	Edit
Home Address 45 Wellington Ave Ottawa, ON K1A 0A6 Canada Billing Address CELINA A BERNAL 231 Dalv Ave Ant 2	✓ Summary Fields Total Lifetime 5,786.16 Contributions Amount of last 1.23 contribution	Tags Contact Type Individual Contact ID 388 External ID
Ottawa, ON K1N 6G1 Canada Home Email 🥝 celinaabernalq_321@gmail.com Billing Email 🥝 celinaabernalq_321@gmail.com	Date of Last 03/02/2023 1:59AM Contribution 03/02/2023 1:59AM Date of First 07/22/2022 9:11AM Contribution 03/02/2022 9:11AM Largest 1,850.00 Contribution 03/02/2023 1:59AM	Gender Date of Birth Age
Phone	Count of 200 Contributions	Employer Job Title Recognition Name
Website		canadan reps
Delete Contact		
	View the Contact's Contribution history	

5. You will see a list of all the Contributions associated with that Contact. Then, select DMS Recurring Contributions

Wellness Avenue	Dashboard (Contacts Contribution	ns Campaigns Opportunit	ies Reports DMS Mail				Settings Help DMSCA DMSCA -	
Senjamin A Franklin 🗐 Summary 🚍 Contributions 200 🗐 Activities 430 🔿 Relationships 1 👹 Groups 5 🗋 Notes 1 🗞 Tags 0 🐵 Opportunities									
Contributions 200 DMS Recurring Contributions 1 Current Year-To-Date – \$ 1,123.80 Total – \$ 5,786.16			# Completed Contributions - 62 # Completed - 200			Avg Amount - \$ 18.13 Avg - \$ 28.93			
Click arrow to view payment de	tails.						• A	Ndd Contribution	
Received	Amount	Fund	Campaign	Method	Method	Status	Receipt No.	Thanked	
March 2nd, 2023 01:59 AM	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed			
March 1st, 2023 01:51 AM	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed			
February 28th, 2023 01:38 AM	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		?	
			DMS Recur	ring Contributions					

6. Identify the Contribution you wish to update and select More

Wellen Avenue	Dashboard Dashboard	Contacts Contributions Campaigr	is Opportunities Reports	DMS Mail		Settings Help DMSCA DMSCA +				
Benjamin A Franklin I Actions 200 S Activities 430										
Contribution This section only r Active Recu	Contributions 200 DMS Recurring Contributions 1 This section only reflects recurring contributions set up through your DMS payment processor. Active Recurring Contributions									
Amount	Frequency	Start Date	Installments	Payment Processor	Status					
\$1.23	Every 1 day	Aug 19th, 2022 9:44 AM	Ongoing	Credit card	Ongoing	View More :				
Inactive Re	curring Contributions									
Amount	Frequency	Start Date	Installments	Payment Processor		Status				
Delete Cont	tact					?				
	Select More to update									

7. Afterwards, you'll be able to:

- a. Cancel the DMS Recurring Contribution,
- b. Update its billing details (for credit card payments)
- c. Update a few other Contribution details (see below)

Updating Billing Details

This section will highlight how you can change the billing information for a donor's recurring **credit card live payment**.

Reminder: To change a donor's **bank account details** (for EFT live payments), you'll need to login to your iATS Portal directly.

1. Identify the DMS Recurring Contribution you're looking to update the billing details for

2. Once you've identified the Contribution, click More, then select Update Billing Details

Avenue	Dashboard	Contacts Contributions Campaign:	Opportunities Reports	DMS Mail		Settings Help DMSCA DMSCA +				
Benjamin A F	Franklin ∃ Contributions 200 ■ Ac	ctivities 430 (3) Relationships 1 🍟	Groups 5 📄 Notes 1	🐌 Tags 0 🛞 Opportunities		Edit				
Contributions This section only r Active Recu	Contributions 200 DMS Recurring Contributions 1 This section only reflects recurring contributions set up through your DMS payment processor. Active Recurring Contributions									
Amount	Frequency	Start Date	Installments	Payment Processor	Status					
\$1.23	Every 1 day	Aug 19th, 2022 9:44 AM	Ongoing	Credit card	Ongoing	View More				
Inactive Re	Update Recurring									
Amount	Frequency	Start Date	Installments	Payment Processor		Str				
Delete Cont	tact					?				
			Update Billing De	tails						

3. On the next page, you'll be able to update the Contact's Payment Method as needed and Save.

lness	Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail								
	Update Billing Details		4	∋.2 ×					
A Franklin	Recurring Contribution Details: \$1.23 ever Use this form to update the credit card and bi	y 1 day illing name and address used for this recurring cont	ntribution.	Í					
Contributions	Credit Card								
itions 200 DM:	Card Type	- select - 🛛 👻							
only reflects recurring	Card Number*								
Recurring Contri	Security Code *								
	Expiration Date *	-month- 💌 -year- 💌							
	Billing Name and Address								
	Billing First Name *	Benjamin		1.00					
Recurring Cont	Billing Middle Name	A							
_	Billing Last Name*	Franklin							
Contact	Street Address*	231 Daly Ave, Apt 2	↓						
	City*	Ottawa							
	Country*	Canada 👻		-					
	× Cancel			✓ Save					
		U	Update Billing Details and Save						

Reminder: Credit card expiry dates don't automatically update in the DMS. For any expired credit cards, you'll need to update the billing details manually following the steps above.

Tip: Want to know which DMS payments have credit cards that will expire soon? Learn more!

Updating Other Details

1. Follow the steps above to identify the DMS Recurring Contribution you wish to update the additional details for

2. After selecting More, select Update Recurring Contribution

Avenue	Dashboard	Contacts Contributions Campaign	s Opportunities Reports	DMS Mail		DMSCA DMSCA +		
enjamin A F	Franklin	ctivities 430 (🌫 Relationships 1 🛔	Groups 5 🔲 Notes 1	🗞 Tags 0 🍥 Opportunities		Edit		
Contributions 200 DMS Recurring Contributions 1 This section only reflects recurring contributions set up through your DMS payment processor.								
Active Reco	Frequency	Start Date	Installments	Payment Processor	Status			
\$1.23	Every 1 day	Aug 19th, 2022 9:44 AM	Ongoing	Credit card	Ongoing	View More:		
Inactive Re	Update Billing Details							
Amount	Frequency	Start Date	Installments	Payment Processor		Sta		
Delete Cont	act							
Undate Decurring Contribution								

3. On the next page, you'll be able to update the following fields, and select Save when you're done.

Wellness Avenue	Dashboard Contacts Contributions Campaigns	Opportunities Reports DMS Mail	Settings Help DMSCADMSCA +			
	Update Recurring Contribution					
	Contact Name	Berjamin A Franklin				
Benjamin A Franklin	Payment Processor	Creditand	Edit Actions			
🖭 Summary 🖽 Contributions	Financial Type	Fitness				
Contribution 200	Payment Instrument	Credit Card				
This section only reflects recurring	Failure Count	0				
	Recurring Contribution Amount	CAD (\$) 123 (every)				
Active Recurring Contri	Number of Installments	12				
Amount		Total number of payments to be made. Set this is an open-ended commitment Le. no set end date.				
\$1.23	Next scheduled Contribution Date	03/03/2023 🗎 🛪	View More I			
	Notify Contributor?					
Inactive Recurring Cont		Contact will not be emailed as they have a "Do Not Email" preference.				
Amount	Campaign	Bottle Drive O	Status			
	Fund*	Fitness				
Delete Contact	Recurring Contribution Status	Ongoing *				
	Start Date	2022-08-19 09:44:00				
	# Cancel	✓ Sare				
			•			
Update other details						

- *Number of Installments:* Total number of payments to be made. Set this to 0 if this is an open-ended commitment i.e. no set end date.
- Next Scheduled Contribution Date: when you would like the next payment to be made by the donor.
- Notify Contributor: you can notify the Contact/donor of these changes.
- Campaign: the Campaign associated with this donation.
- Fund: the Fund this donation is going into.
- Status: whether DMS Payments has been Cancelled, Completed, etc.
- *Start Date*: when the payments will start. You can only select a date from the time you're adding this Online Contribution or a future one.

4. **If you decide to notify the Contact of these changes**, they'll receive an email notification mentioning the changes you've made to their DMS Payments.

Recurring Contribution Update Notification			ē	Ø			
Wellness Avenue Foundation <u>via</u> sendgrid.net to me ~	12:51 PM (2 minutes ago)	☆	4	:			
	Dear .						
	Your recurring contribution has been updated as requested:						
	Recurring contribution is for S (every (s).						
a falsa da spilara a sura-rena da da be	If you have questions please contact us at "Wellness Avenue Foundation".						
Email notification to Contact							

Cancelling a Single DMS Recurring Contribution

1. Follow the steps above to identify the DMS Recurring Contribution you're looking to cancel

2. After selecting *More*, select *Cancel*

Avenue	C}} Dashboard	Contacts Contributions Campaign	s Opportunities Reports	DMS Mail		Settings Help DMSCA DMSCA ~
Benjamin A F	Franklin ∃ Contributions 200	tivities 430 🌝 Relationships 1 🛔	Groups 5 🔲 Notes 1	🕷 Tags 0 🛛 🛞 Opportunities		Edit
Contribution: This section only r	s 200 DMS Recurring Con reflects recurring contributions s	tributions 1 set up through your DMS payment processo				
Amount	Frequency	Start Date	Installments	Payment Processor	Status	
\$1.23	Every 1 day	Aug 19th, 2022 9:44 AM	Ongoing	Credit card	Ongoing	Cancel View More:
Inactive Re	curring Contributions					Update Billing Details
Amount	Frequency	Start Date	Installments	Payment Processor		Contribution ?
	-	Cal	ncel a recurring Cor	tribution	-	_

3. In the popup window, you can (1) add the *Cancellation Reason* and also (2) notify the Contact that the recurring donation has been cancelled

H.	Dashboard Contacts Contributions Camp	igns Opportunities	Reports	DMS Mail			Settir DMSCA D		
anklin	Cancel Recurring Contribution					₽Z×	E Actions		
Contributions	Recurring Contribution Details: \$ 1.23 every 1 of Click the button below to cancel this commitment of Cancellation Reason	ay nd stop future transaction Donor request	ns. This does n	ot affect contributions wh	nich have already been co	mpleted.			
ring Contr	2 Notify Contributor? (celinaabernalq_321@gmail.con) 🔽							
Every 1	X Not Now				 Cancel Recurring 	Contribution	View		
rring Con	tributions								
	Cancellation confirmation								

4. **If you decide to notify the Contact of these changes**, they'll receive an email notification mentioning that their DMS Recurring Contribution was cancelled:

Recurring Contribution Cancellation Notification -			÷	ø		
Wellness Avenue Foundation via sendgrid net 12:56 PM to me *	0 minutes ago)	☆	*	:		
Dear						
Your recurring contribution of \$ has been cancelled as requested.						
Cancellation notice to Contact						